



We are committed to helping spark and grow **healthy, vibrant, inclusive communities** across the South Okanagan Similkameen.

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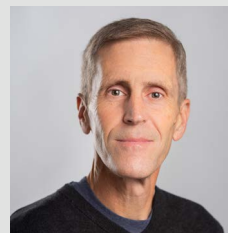
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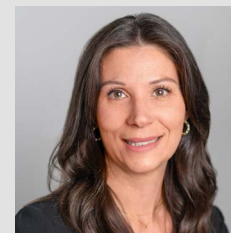
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The Community Foundation of the South Okanagan|Similkameen acknowledges that our work takes place on the ancestral lands of the nsyilxcən-speaking people in senq'a?itk^w (South Okanagan) and sməlqmix (Similkameen) territories.

We are grateful to the Syilx People for their stewardship of the Land and Waters since time immemorial.

What is a community foundation? It's a group of dedicated volunteers and professionals who are committed to making your community a better place to live, work and play.

Yes, the Community Foundation offers grants to charities. Yes, the Foundation helps donors create endowment funds. But this is not what we "do". These activities are part of "how" we do "what" we do.

The "what" is community impact. We improve communities by investing in and funding charities, programs and services across every area of need in the community. We are constantly evolving, looking for new and more effective ways to make life better.

All of these investments are made in partnership with donors and other funders. Bringing donors and funders together creates opportunities that wouldn't exist otherwise as we pool our dollars to make meaningful change.

So why not join us at the Community Foundation? Fund your project or give to your community. Together we can make things better.

—Robin Robertson, Board President



Robin Robertson,
Board President

2022 by the numbers

\$1.3m+

distributed in 2022

284

grants made

\$124,583

in Neighbourhood
Small Grants

\$8.6m

total amount granted
in our history

98

charties received grants

\$50,160

awarded in bursaries

\$15m

in assets under
management

\$1,220,637

received in donations

380

380 people donated to
the Foundation in 2022

155

funds managed

To view our financial statements, visit www.cfso.net

Charities create their own source of stable funding

More than 20 charities have set up their own Agency Fund with us. Their fund is invested so that earnings are granted back to the charity, year after year.

\$49,230

granted from Agency Funds

\$38,275

donated into Agency Funds

First Agency Fund keeps on giving

In 2022, we partnered with the Penticton Arts Council to host a Legacy Appreciation Event. It was a wonderful way to celebrate our donors.

The location was also perfect. After all, the Arts Council was the very first Agency Fund to be created with the Foundation!



Legacy Club event held at the Leir House, in collaboration with Penticton & District Arts Council and Penticton Academy of Music & Dramatic Arts

Agency Funds:

- BC Schizophrenia Society - Penticton Fund
- Critteraid Legacy Fund
- NK'MIP Desert Cultural Centre Legacy Fund
- Okanagan Boys & Girls Clubs Fund
- Okanagan College Endowment Fund
- Okanagan Regional Library Fund
- Okanagan Symphony Society Fund
- Okanagan Symphony Society-Penticton Branch Fund
- Okanagan Symphony Youth Orchestra Endowment Fund
- Oliver & District Heritage Society Fund
- PDCRS Fund
- Penticton & District Community Arts Council Fund
- Penticton Art Gallery Legacy Fund
- Penticton Public Library Fund
- Princeton Museum & Archives Legacy Fund
- SO Secondary School Enrichment Fund
- SOS Brain Injury Fund
- South Okanagan Women in Need Agency Fund
- Summerland Arts Council Fund
- Summerland Ornamental Gardens Sustaining Fund
- The Land Conservancy-Okanagan Region Fund
- United Way Tomorrow Fund

'Base' funding for the symphony

The Okanagan Symphony received a big boost to its Agency Fund last year, with a triple-your-donation matching campaign. Thanks to the generous support of donors, the symphony reached its \$50,000 fundraising goal.

This boost ensures that the symphony will have a more stable source of funding. Audiences up and down the valley will continue to enjoy amazing professional talent and guest artists, as well as take part in a variety of community engagement activities including the flagship program, the Okanagan Symphony Youth Orchestra.

[Read more here.](#)



Meredith Allen, bass player in the Okanagan Symphony Youth Orchestra

With Donor Designated Funds...

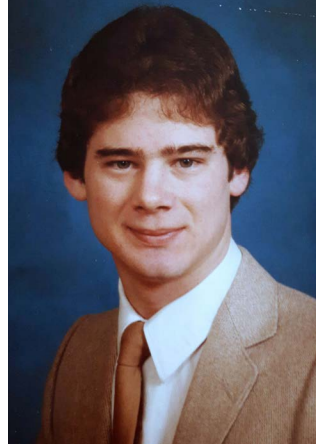
Donors support their favourite charities

When a donor is certain about what they'd like to support, they can set up a fund with us and name a specific charity to receive grants from their fund, in perpetuity.

Creating a legacy for local Scouts camp is a natural fit

Donna Schellenberg and her late husband, Harold have been longstanding supporters of the Foundation and the community. In previous years, they had set up endowment funds with the Foundation in support of the arts and the symphony, both passions of theirs. This time, Donna decided to create a legacy fund in honour of her late son, Vance.

Donna describes Vance as a smart young man who loved the outdoors and nature. Throughout his childhood, Vance was a member of the Boy Scouts and he and his family spent many happy days at Camp Boyle in Summerland. Establishing Vance's Camp Boyle Legacy Fund in support of Scouts Canada's Camp Boyle was a natural fit.



[Read more here.](#)

Legacy Wall coming in 2023 - Our virtual Legacy Wall is a space designated for our Legacy Club members to share their stories about what (or who) inspired them to make a gift to create a lasting impact on the community.

With Donor Advised Funds...

Donors can change their giving choices

Donors can check in with us on an annual basis to select a charity and to learn about emerging community needs.

Kind-hearted Knights support a wide variety of charities

Thanks to their Donor Advised Fund, the Knights of Pythias in Penticton have supported a variety of charities for the past 20 years. Annually, they select charities that are close to their hearts, meaning that their fund has granted \$40,000+ to more than 30 organizations.

With the lodge's legacy in mind, the Knights worked closely with the Foundation to ensure their Fund continues to give to causes they care about, for generations to come. In 2022, they boosted their fund with a donation of \$81,000!

[Read more here.](#)



Donor Designated Funds:

Bob & Frances Garland Fund
Brule Windeler Legacy Fund
Colin & Lois Pritchard Foundation Fund
Edith Forster Legacy Fund
Friends of the Gardens Fund
Harold & Donna Schellenberg Legacy Fund
Harold & Flora Hoey Fund
House Endowment Fund
Hugh & Eva Cleland Fund
Irvine & Doreen Adams Memorial Fund
John Sloane Brain Injury Legacy Fund
Katie Lynn Apgar-Knezacek Fund
Knights of Pythias - Fund #1
Knights of Pythias Lodge #49 Fund 2
Kristi's "Supporting the Dream" Fund
Magdus & Roy Ornamental Gardens Legacy Fund
Marjorie Maclean Fund
Merle Waite Endowment Fund
Okanagan Nation Women's Emergency Fund
Patricia & Murray Craig Memorial Endowment Fund
Richard & Rose Cooper Fund
Ryga Festival Society Fund
South Okanagan Research & Capacity Building Endowment Fund
SS Sicamous Marine Heritage Fund
Toni & Bernie Cattani Legacy Fund for the Arts
Trehearne Family Fund
Vance's Camp Boyle Legacy Fund
Winkelaar Family Fund

21

charities received grants from Donor Advised Funds

Donor Advised Funds:

100 Men Penticton Legacy Fund
Barbara Macdonald Family Fund
Bjerkan Family Fund
Business Gives Back Fund
Debbie Nelson Fund
Greenwood Forest Products Legacy
Neil and Shirley Murray Family Fund
Okanagan Fest-Of-Ale Legacy Fund
Oliver Rotary Endowment Fund
Pat Buschlen Memorial Fund
Penny Lane Community Legacy Fund
Penticton Auto Dealers Fund
Penticton Oldtimers Hockey Club Legacy Fund
Peterson Family Fund
Ron Bell & Family Fund
SOSCP Legacy Fund
Stoof/Straatsma Family Fund
Summerland Credit Union Legacy Fund
Susan & Thomas Kelly Fund
Tony & Judy Lloyd Family Fund

Donors support education

Donors can set up bursaries to honour individuals or to focus on specific programs or skills, and they can choose to assist recent graduates or returning students — making education more accessible to all.

NEW bursary honours newspaper editor



A newly-created bursary honours Tara Bowie, editor of the Keremeos Review who died in 2020. Not only does this bursary symbolize Tara's love of Keremeos, it also gives students at Similkameen Secondary a leg up as they pursue their own dreams.

"My hope with this is to help a student become what they want to become,"

[Read more here.](#)

23

bursaries granted by the foundation

says Tara's mom, Nancy Birtch. "It may be a little stepping stone but it's still a stepping stone that leads to where they eventually want to go."

By helping students realize their dreams, this bursary, in a sense, will help create more of the kind of stories that Tara loved to write – those that had to do with children and young adults, and of people working together to help others. "Her favorite stories really were the ones of the community coming together."

Bursaries give students a boost

"I'm currently doing my third practicum on the acute care floor at the hospital, and I feel in my element and I'm confident in my skills. It has been an intense journey so far in the Practical Nursing Program but lots of positive experiences and achievements are coming out of it. Donors like you help make succeeding for students like me possible."

Andréanne Beaumier-Fortin
Recipient of COP Centennial Legacy award

Bursary Funds:

Alanna Matthew Memorial Fund
Blanche & Rollo Ceccon Legacy Bursary Fund
Canadian Federation of University Women Fund
COP Centennial Legacy Fund
Culver Family Bursary Fund
Dr. John and Kathy Scarfo Fund
Eva & Herbert Rosinger Scholarship Fund
Frances Harris Fund
Harold & Flora Hoey Fund
Irene & Charles Armstrong Bursary Fund
Kaleden Bursary Fund
L&R Supplementary Bursary Fund
Lynn & Brian Jackson Endowment for Fine Arts
Morris & Birgit Rosenberg Bursary Fund
Music Under the K Fund
Okanagan Similkameen Concert Society Fund
Pat Clarke Memorial Bursary Fund
Penticton Women In Business Fund
Ramada Inn Viticulture Fund
Scott & Helen Perry Bursary Fund
Sharon Amos Legacy Fund for the Arts
SO Boundary Labour Council Fund
South Okanagan Indigenous Education Fund
Tara Bowie Bursary Fund
Thea Haubrich Legacy Fund
Weyerhaeuser Legacy Fund

\$50,160

granted for bursaries

Bursary Recipients*

Javier Carlos
Maxine Clements
Candice Collins
Kai Creagh
Amelia De Gagne
Sarah Fahey
Tia Ferlizza
Sydney Folk
Jonas Henderson
Kale Lawrence
Jade Lowenstein
Amy Lucich
Luke MacIntyre
Curtis Nickle
Kaitlyn Nightingale
Catarina Oliveira
Matt Olsen
Alison Rempel
Sophie Robinson
Jessica ter Wolbeek
Evelyn Travis
Natalie Yurkowski

*Does not include recipients chosen by organizations other than the Foundation

With Discretionary Funds...

Donors rely on the Foundation's expertise to respond to the community's changing needs

Discretionary Funds give the Foundation the greatest flexibility to support a wide variety of needs. Some grants address emerging issues, while others support project and program delivery, operations, equipment purchases, and much more.

The local **Canadian Mental Health Association** used their Community Foundation grant to build a kitchen that is the focal point of programming in their new location.

[Read more here.](#)



A grant to **Vermilion Forks Elementary's After School Program** contributed to improved learning outcomes for young students.

[Read more here.](#)

With Community Funds...

Donors can give where they live

Many communities in our region have a community fund with us, which is used to support local projects and programs. By donating to the fund, residents can help their communities now and in the future.



The **Oliver and Osoyoos Community Funds** helped to support the **Cindy Taylor Safe Home** in 2022.

[Read more here.](#)

Discretionary Funds:

1 Penticton Community Fund
100 Women Who Care Fund
1995 Summer Games Legacy
1996 BC Festival of the Arts Fund
2004 BC Seniors Games Legacy Fund
Alan & Lorna Dawkins Legacy Fund
B2B Fund
Barbara Pearce Summerland Community Fund
Children's Trust Fund
Chris Grauer Endowment Fund
City of Penticton Trust Fund
Environmental Legacy Fund
Eva & Herbert Rosinger General Fund
Francis & Marion Kanuit Fund
George & Eva Kassa Legacy Fund
Harman Community Development Fund
Harold & Irene Myers Family Fund
HSBC Fund for Youth
John & Doreen Wisenden Fund
John Pankiw Family Fund
Kampman Family Fund
King Kirkpatrick Endowment Fund
Lan & Pearl Fruno Legacy Fund
Lancey Family Fund
Leonard Futter Fund
Margaret Neuhaus Fund
Meiklejohn Family Fund
Milton Orris Legacy Fund
MS Anonymous Fund
Penticton Public Art Fund
Philip Locke Penticton & District Building Fund
Providence Funeral Homes Legacy Fund
Rita Fawcett Memorial Fund
Rotary Club of Penticton Legacy Fund
School Breakfast Program Fund
Summerland Credit Union Fund
Wood Family Fund

\$226,899

granted from
Discretionary &
Community Funds

Community Funds:

Kaleden Community Fund
Lower Similkameen Community Fund
Okanagan Falls Community Fund
Oliver Community Fund
Osoyoos Community Fund
Penticton & District Fund
Princeton & District Legacy Fund
Summerland Community Fund

We provide positive impact throughout our region

With earnings generated from a variety of funds, the Community Foundation was able to provide 284 grants to 98 charities in 2022.

Agur Lake Camp Society
 AlleyCats Alliance
 Alzheimer Society
 Animal Lifeline Emergency Response Team (ALERT)
 BC SPCA
 Boys & Girls Clubs Okanagan
 Canadian Council of the Blind
 Canadian Food for Children
 Canadian Freestyle Ski Association
 Canadian Guide Dogs for the Blind
 Canadian Mental Health Association
 Canadian Red Cross - HELP Service
 Cawston Primary School
 Critteraid
 Desert Valley Hospice
 Dragonfly Pond
 Friends of the Gardens Society
 Island Mountain Arts
 Junior Achievement BC
 Kidney Foundation
 Lower Similkameen Community Services Society - Starfish Program
 NeighbourLink Summerland
 NK'MIP Desert Cultural Centre
 Oasis United Church - Food Bank
 OK College Foundation
 OK Humane Society

Okanagan Falls Lions Club - Okanagan Falls Elementary School Breakfast Program
 Okanagan Nation Family Intervention and Services Society
 Okanagan Parks Society
 Okanagan School of the Arts
 Okanagan Similkameen Stewardship Society
 Okanagan Symphony Society
 Oliver & District Heritage Society
 Oliver Food Bank
 OneSky
 OSNS
 Penticton & Area Access Centre
 Penticton & District Community Arts Council
 Penticton & District Society for Community Living
 Penticton Academy of Music
 Penticton Art Gallery
 Penticton Indian Band - Little Paws Children's Centre
 Penticton Kiwanis Music Festival
 Penticton Meals on Wheels
 Penticton Public Library
 Penticton Recovery Resource Society - Discovery House
 Penticton Secondary Schools Bursary & Scholarship Program
 Penticton Soupateria
 Penticton Speedway Foundation

\$961,524

Total value of grants

Princess Margaret School Foods/Cafeteria
 Princeton & District Community Services Society
 Princeton Secondary School Students Award Program
 Pythian Cerebral Palsy Committee
 Salvation Army
 School District No. 53 (Okanagan Similkameen)
 School District No. 67 (Okanagan Skaha)
 SO Secondary School Enrichment Fund
 South Okanagan Health Care Auxilliary Society
 South Okanagan Integrated Services Society
 South Okanagan Rehabilitation Centre for Owls
 South Okanagan Secondary School
 South Okanagan Similkameen Conservation Program
 South Okanagan Similkameen Medical Foundation
 South Okanagan Similkameen Mental Wellness Society
 South Okanagan Women in Need Society
 Summerland Community Arts Council
 Summerland Food Bank
 Summerland Ornamental Gardens
 The Good Samaritan Society
 The Land Conservancy-Okanagan Region
 The War Amps
 Town of Osoyoos
 United Way
 Vermillion Forks Elementary School

With Partner Granting Programs...

We provide locals with access to funding from other sources

In addition to its own grantmaking, the Community Foundation provides access to funding opportunities from other sources, including government and corporate funding programs.

In 2022 we were involved with a number of these opportunities, including:

- Kia Communities in Motion
- Fund for Gender Equality
- Canada Healthy Communities Initiative
- Investment Readiness Program



Photo credit: Justin Wu

The South Okanagan Immigrant & Community Services Society received a Kia Communities in Motion grant to help improve access to transportation including bike sharing and repairs so newcomers can be better connected to their communities.

[Read more here.](#)

We connect local people with local charity

From giving circles to micro-grants, we harness the giving intentions at the grassroots level to create big change!

100 Men and Women events provide fun opportunities to give back to community

In 2022, the popular 100 Men and 100 Women Who Care events, returned to in-person gatherings at local restaurants, wineries, cideries and brewhouses.

At these socials, people meet new friends, enjoy a drink, and support local charity, all within an hour. Back in full swing, these giving circles were able to raise nearly \$50,000 to support 20+ charities.

[> Learn more about 100 Women Who Care](#)

[> Learn more about 100 Men Who Care](#)



100 Women's social at Elma



100 Men's social at Tin Whistle Brewing

176 women & men who care

in support of **21** charities

raised **\$48,350**

by meeting **4x** in the year

Neighbours gather and celebrate where we live

[Read more here.](#)

Thanks to the Neighbourhood Small Grants program, people with great ideas received up to \$500 to create a huge variety of activities all across our region. Pictured clockwise: an outdoor nsylxcən language and painting workshop in Osoyoos, an outdoor party in Penticton, a beautification project and picnic at Heritage Hills, and a chili cook-off in Princeton.



in 2022
2,000+
attendees

65
activities across
the region



We are able to make connections and drive innovation

Our goal is to connect those who want to give with those on-the-ground creating change.

Our Foundation is part of **Community Foundations of Canada**, a network of over 200 community foundations!

We would like to thank our Okanagan Community Foundation partners - the **Central Okanagan Foundation** and the **Community Foundation North Okanagan** for collaborating with us on many projects.

Collaboration keeps food in the cupboard

It's getting harder every year to stock the Food Cupboard at Oasis Church, thanks to the economic slowdown and soaring food prices. And yet demand continues to grow. In 2021, volunteers handed out 75 weekly hampers. Just a year later that number jumped to more than 150 hampers given out to individuals and families in need.

To help deal with this rapid rise in demand, the Community Foundation provided a grant. "Food security is a priority for us and also for this donor," says Aaron McRann, executive director. "We're grateful to be at the heart of a community, so we can connect local people with local charity."

[Read more here.](#)



The table is set to host courageous conversations

Table Talks is a pilot program that trains hosts to bring both Indigenous and non-Indigenous neighbours together around their own kitchen tables to share truth and build trust.

A partnership between indigenEYEZ, kinSHIFT and the Community Foundation, Table Talks is currently

training 15 participants, who together are learning about the impacts of colonization as well as learning, how to incorporate silyx principles and values into their conversations. The project is co-funded by the Vancouver Foundation.

[Read more here.](#)

Partnering with national organization to spread awareness of alcohol use disorder treatment

The Community Foundation is supporting the launch of a national organization that started right here in Penticton! The Canadian Alcohol Use Disorder Society began in 2020 with Dr. Jeff Harries, a Penticton family physician. Dr. Harries made it his mission to spread the word that

alcohol use disorder is a treatable medical condition, with a full recovery possible for just about anyone. Now, through our collaboration, this message is making its way to communities across Canada, starting with a pilot engagement program in Princeton, BC.

[Read more here.](#)



We are able to leverage our assets to boost local organizations

Granting isn't the only way we work with our communities, we invest in them too! Impact Investing opens up new and innovative partnerships and allows us to make an even larger impact on the community.

Making an impact for youth



The Penticton Youth Centre was our first Impact Investing venture and it has proven to be a successful and growing resource for youth and families in need.

Since its opening in 2019, the Youth Centre's service providers have been busy, serving more than 1,000 youth, and adapting services to meet the growing and emerging needs of the community.

In 2022, the Centre began renovations to turn its 3,500 square ft basement into a space that better meets the

needs identified by the youth service providers including recreation and activity space, laundry facilities, showers, and a care closet.

Our next major step is to install a much-needed elevator. The Youth Centre's work is to remove both physical and mental barriers to reach young people as early as possible, before health challenges become severe. Currently, accommodations are made for those with accessibility challenges, but this is not the same as offering the same space to everyone.

[Read more here.](#)

Findings from our Vital Signs survey kickstarted the development of the Youth Centre.

Vital Signs measures the well-being of the communities across the South Okanagan Similkameen and encourages people to learn and address the critical issues that affect communities.

"The Youth Centre is saving lives. And that's really special and it was so needed in Penticton."

Honor Hollman,
Former Youth Engagement Strategy
Project ambassador and Foundry
Penticton Peer Support Worker



The What and Why of Impact Investing

Not everyone wants to create an endowment fund or make a donation. And not all problems can be solved with grants.

Impact investments bring more money to bear on a problem by offering monetary returns while still prioritizing the "social return on investment".

But perhaps more important is that

Impact Investing inspires people. One Foundation donor was so excited by our current investments that they immediately contributed \$200,000 to our next investment. And when charities hear that we can invest they think differently about how they run their operations. Impact Investing is challenging, but it's worth it!

[Read more here.](#)

Giving Choices

We offer a wide variety of ways for people to give back to their community

Funding Change

We also help individuals and organizations fund community projects, programs and events

Get involved!

Learn how to start a fund
Check out our giving circles
Ask us about volunteer opportunities
Take the Vital Signs survey

Find out more!

Visit our website
Subscribe to our newsletter
Find us on Facebook
@cfsouthokanagansimilkameen



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 **COMMUNITY
FOUNDATION**
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